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Spain

Strawberries

Annual

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Report Highlights:

MY 2002 Spanish strawberry production decreased substantially from MY 2001 due to a decrease in planted area. MY 2002 fresh strawberry imports increased to offset some of this decrease in production while exports and domestic consumption decreased. MY 2003 production is forecast to increase.

Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Madrid [SP1], SP

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EXECUTIVE SUMMARY

The Spanish strawberry harvest season is divided into two crops. High production and low prices in MY2001 led the Huelva farmers to decrease the area planted in MY 2002. Total production was decreased due to this decrease in planted area. More than 95 percent of the strawberries produced in Spain are grown in Huelva. Scattered planting is also located in Cadiz. The Spanish growers also did not have to deal with a lack of strawberry pickers in MY 2002 as they did in MY 2001 as a new immigration policy allowed them to have the labor needed.

Spain strawberry area decreased 18 percent from 9,100 hectares (ha) in MY 2001 to 7,500 ha in MY 2002. The official data indicates that strawberry production, at 301,000 metric tons (mt) in MY 2002, is down nine percent from MY 2001 (328,000 mt). Harvested area covered 7,300 ha in MY 2002; down 20 percent from 9,100 ha in MY 2001.

The strawberry sector continues its research to develop its "own" strawberry variety. The medium-term research goal is to not only avoid the payment of royalties to the United States, but to get a stronger variety especially developed for Huelva soil and weather conditions.

FRESH STRAWBERRIES

PS&D Table

PSD Table						
Country	Spain					
Commodity	Fresh Strawberries				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	9500	9100	9000	7500	0	8000
Area Harvested	9300	9100	8700	7300	0	8000
TOTAL Production	304000	328000	322000	301000	0	310000
Imports, Fresh	3500	3140	3000	5660	0	3000
TOTAL SUPPLY	307500	331140	325000	306660	0	313000
Exports, Fresh	195000	212090	200000	190000	0	205000
Domestic Fresh Market	62500	69050	70000	64660	0	68000
For Processing	50000	50000	55000	52000	0	40000
TOTAL UTILIZATION	307500	331140	325000	306660	0	313000

Production

Spanish strawberry production for marketing year 2002 (Jan-Dec) was 301,000 mt, a nine percent decrease from 328,000 mt in MY 2001. High production and low prices in 2001 led the Huelva farmers to decrease the area planted in 2002 and the lower 2002 production was largely due to this decrease in planted area. MY 2003 production is forecast to recover somewhat to about 8,000 ha and 310,000 mt. According to industry sources, 16 percent of the total production has come from strawberries planted under "integrated production." This production is designed to obtain a better quality product using the different elements from the "agrosystem" (water, plant, soil and weather) more effectively with the goal of reducing environmental impact and keeping the production profitable. This process regulates the use of pesticides.

Consumption

Fresh strawberry consumption for MY 2002 was 64,660 mt, a 6.4 percent decrease from 69,050 mt in MY 2001, because of decreased production. MY 2003 consumption is forecast to recover in line with higher forecasted production. Spanish preference is for fresh strawberries and Spaniards like to eat strawberries with cream and use them to decorate cakes and tarts.

Trade

Spanish fresh strawberry exports were 212,090 mt in MY 2001, a 2.6 percent increase from 206,709 in MY 2000. Lower production in MY 2002 is estimated to lead to lower imports for the year than in MY 2001. Post's current

estimate for the full MY 2002 is 190,000 mt. Main markets are Germany, France, the United Kingdom, Italy and Belgium.

As Spain is a major producer and exporter of strawberries, imports are generally a fraction of exports. Spanish MY 2001 imports were 3,136 mt, down from 4,340 mt. in 2000. MY 2002 imports are estimated to be higher than MY 2001 due to the reduced domestic production. Unfortunately, market opportunities for U.S. exporters in this sector are not favorable not only because of Spain's production (which are roughly the same time as the U.S. strawberry harvest), but the berries' shelf life as well.

Export Trade Matrix			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	CY	Units:	Metric Tons
Exports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
Germany	78,709	Germany	91,269
France	55,100	France	53,360
United Kingdom	17,517	United Kingdom	17,530
Italy	15,349	Italy	13,962
Belgium	12,665	Belgium	10,935
Netherlands	8397	Portugal	6,882
Portugal	7356	Netherlands	5615
Austria	4505	Austria	5401
Switzerland	3543	Switzerland	2019
Total for Others	203141		206973
Others not Listed	3,568		5,117
Grand Total	206709		212090

Import Trade Matrix			
Country	Spain		
Commodity	Fresh Strawberries		
Time period	CY	Units:	Metric Tons
Imports for:	2000		2001
U.S.	0	U.S.	0
Others		Others	
France	2,182	France	1,947
Belgium	1,073	Morocco	1,003
Morocco	1005	Belgium	137
Total for Others	4260		3087
Others not Listed	80		49
Grand Total	4340		3136

FROZEN STRAWBERRIES

PS&D Table

PSD Table						
Country	Spain					
Commodity	Frozen Strawberries				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Deliv. To Processors	50000	50000	55000	52000	0	50000
Beginning Stocks	3500	3500	500	39	0	1989
Production	32000	31000	35200	33250	0	31000
Imports	8000	7346	7000	9800	0	8000
TOTAL SUPPLY	43500	41846	42700	43089	0	40989
Exports	23000	18807	24000	19100	0	20500
Domestic Consumption	20000	23000	18700	22000	0	20000
Ending Stocks	500	39	0	1989	0	489
TOTAL DISTRIBUTION	43500	41846	42700	43089	0	40989

Production

Spanish frozen strawberry production for marketing year 2002 (Jan-Dec) was 33,250 mt, a 7.3 percent increase from 31,000 mt. in MY 2001. MY 2002 production increased due to higher deliveries to processors.

Consumption

The majority of frozen berries are processed by the industry to make jams, yogurt and flavorings. Domestic consumption for MY 2002 is estimated to be somewhat lower than in MY 2001.

Trade

MY 2001 Spanish frozen strawberry exports declined by 21.7 percent to 18,807 mt (24,022 mt in 2000) due to lower total supply in MY 2001. MY 2002 exports are estimated to increase as a result of increased production of frozen berries.

Frozen strawberry imports declined slightly from 7,818 mt in MY 2000 to 7,346 mt. in MY 2001. MY 2002 imports are estimated at 9,800 mt based on Jan-Jun 2002 partial year trade data. Morocco continues to be the major supplier of frozen strawberries to Spain.

Export Trade Matrix			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	CY	Units:	Metric Tons
Exports for:	2000		2001
U.S.		U.S.	
Others		Others	
Netherlands	8,106	France	4,705
Germany	5,720	Netherlands	4,504
France	3,248	Germany	3,502
Italy	2,195	Italy	1,271
Austria	1326	Austria	1,080
Belgium	452	UK	675
Total for Others	21047		15737
Others not Listed	2975		3070
Grand Total	24022		18807

Import Trade Matrix			
Country	Spain		
Commodity	Frozen Strawberries		
Time period	CY	Units:	Metric Tons
Imports for:	2000		2001
U.S.		U.S.	
Others		Others	
Morocco	7,257	Morocco	6,911
Belgium	169	Belgium	221
United Kingdom	124	Germany	86
Total for Others	7550		7218
Others not Listed	268		128
Grand Total	7818		7346